

Request for Proposals
For
Global E-commerce Masterclasses and Fact Sheets
for Atlantic Canada Exporters

Deadline: Wednesday September 23rd, 2020 4:30pm ADT

Project Background

In the past, Atlantic Canada's companies have faced challenges around visibility and in trying to be seen as competitive in Canada and within international markets. These challenges, however, have been further enhanced by COVID-19. Today companies face an incredibly difficult business climate with borders closing, bricks-and-mortar businesses having to shut their doors, and people told to isolate at home. As a result, human behaviors around communication, travel and buying habits, among many other things, have changed greatly. Very quickly, consumers have shifted from offline to on-line, using new technologies for such things as communication, education and for buying their personal need items such as groceries, pharmaceuticals and general retail items, etc. As a result, companies are struggling to survive and must begin developing and implementing on-line and/or e-commerce strategies and roadmaps within their business models to survive. The purpose of these masterclasses is to accelerate company's global e-commerce launch through training, coaching and e-commerce roadmap development.

The objective of this request for proposals is to retain a qualified consultant(s) for two components. The first is to develop and deliver a series on online training sessions (E-commerce masterclasses) and assist companies with e-commerce roadmap development. The second component is the creation of ten E-commerce Fact Sheets. Consultants may bid on the entire project or on one of the two components. Consultants may also bid on delivery of the E-commerce Masterclasses for all four Atlantic Provinces or for an individual province.

The committee for this project will consist of representatives from the Nova Scotia Association of Community Business Development Corporations (Association), and the federal and provincial government trade departments from across Atlantic Canada. The Project Committee will provide guidance to the successful consultant(s) on the development and implementation of the project components.

Scope of Services Required

Component 1: E-commerce Masterclasses and Roadmaps

Under the Association's management, the consultant(s) will be responsible for:

- Determining eligibility criteria for companies to participate, in consultation with the Project Committee. Potential criteria include: commitment to participation in the training series, need for support to build an executable e-commerce roadmap, provincially or federally registered company in good standing, possess a fully developed exportable product or service that can be sold via digital channels, experienced exporter, have annual sales growth and have senior management commitment to execute on the roadmap developed.
- Developing promotional messaging in consultation with the Project Committee to be used in the recruitment efforts required for the E-commerce Masterclasses.
- Utilizing an existing Digital Maturity Assessment, identified by the Project Committee and ensuring each participating company completes the assessment prior to the training and again after the training is complete (results to be compiled in the final report).
- Developing a series of 5-8 (2-3 hour) sessions focused on experiential learning. These 5-8 sessions will be held virtually at four different time slots, one for each province¹. All sessions are to be recorded for the sole purpose of providing companies access if they are unavailable for the scheduled sessions. During each session, companies will receive guidance, review successful case studies and participate in peer discussions on the key areas of focus required for a company to develop an e-commerce roadmap. Potential training series topics could include, but are not limited to:
 - defining each company's customer centric experience based on an analysis of customer e-commerce needs/interests.
 - defining the specific tasks a customer is trying to accomplish when they interact on the company's e-commerce site and how to improve on these.
 - undertaking company readiness assessments – Reviewing the company's organizational resources, processes or necessary infrastructure required for e-commerce to be successfully implemented in a company
 - outlining all the initiatives that are needed by the company to fill the gaps based on the above assessments to get where the company needs to go in developing a successful e-commerce initiative.
 - prioritizing the key initiatives into an e-commerce roadmap for implementation with priority given to the top initiatives identified.
- Developing assignments for companies to complete between each training session. Participants will be expected to discuss their assignment with their peers during the next scheduled training session.

¹ If multiple consultants are hired the project committee will ensure workshop content is comparable for each province.

- Providing assistance to each company once training is complete to ensure the completion of their e-commerce roadmap.
- Organizing an interactive session upon completion of training for all four cohorts to allow sharing across provinces (collaboration with another consultant may be required should more than one consultant be selected to deliver this project component).
- Researching options for a platform that could be used as an Alumni Channel for companies to stay connected beyond the end of the project.

The E-commerce Masterclasses and roadmap development will be open to companies across Atlantic Canada. Participation will be cohort based with 10-12 companies per cohort from each of the four provinces and intake for the cohorts will take place in the fall of 2020 and late winter 2021. Multiple employees from each company will be eligible to attend so potential participation could be from 10-30 people per session per province.

The Consultant(s) submitting a proposal should clearly demonstrate their ability to provide services and materials in both English and French as one or more of the masterclasses may be required to be offered in French, dependent upon company interest.

Component 2: E-commerce Fact Sheets

Under the Association's management, the consultant(s) will be responsible for:

- Undertaking research to develop 10 E-commerce Fact Sheets for the following markets: Mexico, US, Germany, UK, Netherlands/Belgium, France, Japan, South Korea, China and South East Asia.

Fact Sheets may include, but not be limited to, the following information:

- Top e-commerce marketplaces in the market
 - Any e-commerce trends known about the market
 - E-commerce guides that the TCS may have for the market
 - E-commerce TCS contact in the market
 - Various marketplace providers (eg. Amazon, Shopify, Rakuten, etc.) onboarding and launch guides for the market, if available
 - E-commerce webinars available for the market that are available on demand by government partners or relevant county chambers of commerce or business associations
 - E-commerce partners in the market who can assist with e-commerce services, e-commerce logistics, and e-commerce payments.
 - Available funding resources for Atlantic Canada companies for e-commerce initiatives
 - Other information as deemed appropriate
- Designing and laying out fact sheets in English
 - Designing and laying out fact sheets in French (translation costs will be paid for by the Association).
 - Providing all content in Word and PDF format with relevant links embedded.

Schedule

E-commerce masterclass and roadmap development – Cohort 1: Fall 2020

E-commerce masterclass and roadmap development – Cohort 2: Winter 2021 – early Spring 2021

Fact sheets developed: September 2020 – December 2020

Proposal Submission

Submission procedures are to be followed by all proponents. Proponents are cautioned to carefully read and follow the procedures required by this Request for Proposal, as any deviation from these requirements may be cause for rejection of the submission. The proposal must be signed by the person(s) authorized to sign on behalf of the proponent and to bind the proponent to statements made in response to this Request for Proposals (electronic signatures accepted).

The proposal should include the following:

- The main body of the Proposal will be a maximum of 15 pages. Appendices are excluded from this page count but should be relevant supporting documents: Curriculum Vitae of staff directly working on the project, company profile, and references are examples;
- Clear statement of which components the Consultant is bidding on and whether they are bidding for masterclass delivery in one or all four Atlantic Provinces.
- Introduction to the Consultant including its primary focus of business, services offered, and client base;
- Clear demonstration of background and previous experience working with exporters and e-commerce platforms and undertaking digital maturity assessments should be demonstrated. Preference will be given to more recent (five years) relevant work;
- Clear demonstration of the Consultant's ability to produce clear and concise training aids (documents, assignments, videos, resources, etc.);
- Identification of the Consultant's capabilities across multiple sectors as it is expected there will be significant diversity in the group of participating companies;
- Clear identification of the lead consultant including their role and scope of work. Up to date Curriculum Vitae as an Appendix is required;
- Clear identification of any sub-contractors including their role and scope of work. Up to date Curriculum Vitae as Appendices are required for all sub-contractors;
- Outline of the proposed topics to be covered in the e-commerce masterclasses;
- Methodology for administering the Digital Maturity Assessment;
- Identification of potential platform to be used for the virtual e-commerce masterclasses;
- Methodology for developing the 10 country fact sheets (if bidding on component 2);

- Clear demonstration of the Consultant's ability to provide services and materials in both English and French;
- As an Appendix, names of former clients for whom similar or relevant work has been performed should be presented as references, as well as a description of the work completed including the results achieved;
- Detailed project work plan with associated timelines and deliverables;
- Detailed project budget with fees and expenses for with each component identified separately. Please include in your quotation any administration expenses.

Proposals must be received no later than 4:30pm ADT, Wednesday September 23rd, 2020.

Proposals must be submitted electronically to:

Erinn Smith
 Executive Director
 NS Association of CBDCs
 erinn.smith@cbdc.ca
 Ph: (902) 384-3346

Evaluation Process

The successful contractor will be selected based upon the following:

- Demonstrated understanding of the overall scope and objectives of the proposal;
- Demonstrated experience with e-commerce as it relates to exporting;
- Ability to facilitate training virtually;
- Ability to produce training aids;
- Demonstrated experience with one on one coaching;
- Ability to provide services and materials in both English and French;
- Organization of Proposal
 - Proposal should be concise, comprehensive and presented with clarity to demonstrate how the Scope of Services will be satisfied;
 - Defined work plan and schedule should be included;
- Cost* (in Canadian dollars + HST)

Preference will be given for Consultants who can provide services for all four Atlantic Provinces.

*Determination of best value may not result in the lowest cost being accepted. The selection committee will consist of representatives from the Project Committee.

Budget

Please include in the quotation any administration expenses – printing, mailings, telephone, etc. as no administration expenses will be reimbursed separately from the contract price.

All anticipated translation costs for the E-commerce Masterclass and Roadmaps should be identified separately.

Please note that translation of the fact sheets will be covered by the Association.

Please note – this project is subject to funding approval.

Payment schedule is as follows:

E-commerce Masterclasses and Roadmap Development (component 1):

- 25% upon signing of contract;
- 25% upon completion of cohort 1 masterclasses and roadmap development
- 25% upon completion of cohort 2 masterclasses and roadmap development
- 25% holdback paid upon satisfactory completion of the project.

Market Specific E-commerce Fact Sheets (component 2):

- 25% upon signing of contract;
- 50% upon receipt of draft fact sheets
- 25% upon receipt of final fact sheets

Any questions related to the Request for Proposals may be directed to:

Erinn Smith

Erinn.smith@cbdc.ca

Ph: (902) 384-3346